

Socio-Economic, Cultural and Ecological Implications of Gaming and Tourism in Asia: The Pacific Region between Tradition and Modernity Regarding Comprehensively Entertaining, Family-Oriented and Culturally Preserving Heritage Travel

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ABSTRACT

The casino and the tourist industries have developed in an ever closer relationship, especially in Asia and the Pacific, where gambling is increasingly being legalized following US-American models. While the main motive behind legalization has been economic stimulation and tourism development, those are not automatically achieved by casino development.

However, improved gaming facilities can boost tourism, which in turn benefits the gaming industry, which then can benefit an entire area. Different models of furthering this relationship have been developed. Both the tourism and the gambling industry have taken note of various models and are developing them according to the special Asia and Pacific situation.

Especially Macao's and Singapore's concepts are increasingly adopted for casino tourism destinations in several Asian countries, starting with the legalization of gaming, continuing with integrating the gaming industry with other tourist industries such as conventions and exhibitions, and finally offering comprehensive tourist packages and destinations.

The type of tourist using these increased and improved offers is also shifting from an individual and largely gambling-focused traveler to one who is also business or leisure-oriented. Reacting to these trends, the hotel industry increasingly builds and develops integrated, all-inclusive and family-friendly resorts and amenities. Yet this development relates to gaming-related issues that concern the whole Asia-Pacific region.

Of special interest for banking and finance are governmental legalizing or franchising licenses for gaming and construction of casinos, in relation to previous gaming prohibitions or monopolies. Examples are Asian and Pacific countries opening their gaming industry to international investors, internationalizing and distributing concessions to foreign investment companies, or increasing both casino and tourist income while maintaining financial independence from the gaming sector.

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Introduction: Gaming, Tourism and Finance in Asia

The relationship between finance, tourism, and gambling

In tourism terms, a casino is defined as “a gambling establishment where visitors can find a variety of gaming and/or gambling choices” (Martínez, 2008, p. 117). In research and practice, casinos have only relatively recently caught the full attention of the tourism industry, which however has already led to some interesting insights into the complex relationship between casino and tourist development, especially in Asia and the Pacific.

It is generally recognized that the main motive behind the legalization of gambling – in any part of the world – has been the achievement of purposes beyond gambling, such as economic stimulation and tourism development, mainly because the activity itself is rarely seen as meritorious itself by the public, and especially the residents (Eadington, 1999, pp. 125, 131-132; Jacob 2017, p. 247; McCartney, 2010, p. 170).

Yet tourism stimulation is not per se achieved by casino development as the sole or main pillar of tourism policy; instead, the two have enjoyed an initially separated, and now increasingly symbiotic relationship: improvement in gaming facilities and surroundings can boost tourism, which again benefits the gaming industry (Jacob, 2017, p. 249).

But regional economic stimulation by means of casino tourism requires that a considerable proportion of customers come from outside the region where the casino is located (McCartney, 2005, p. 41; Murdaugh, 201, pp. 60-64; Vogel, 2012, pp. 200-202).

Legalized gambling and tourism, then, show an interesting paradox: the tourist attraction of gambling hinges on its prohibition in neighboring locales, since otherwise the casino tourists would have less incentive to make the trip. Consequentially, if gambling continues to be localized around the world, then casino tourism will likely decline (Eadington, 1999, p. 132).

The only exception to this scenario occurs when gambling, and especially casino tourism, becomes part of a wider range of complementary entertainment offerings. This formula, developed by Las Vegas, is now emulated increasingly in other parts of the world, especially in the Asia and Pacific region (Eadington, 1999, p. 133; Fenich and Hashimoto, 2004; Jacob, 2017, p. 248; Vogel, 2012, pp. 186-197; Wong, 2016, pp. 219-220).

This also means that new destination resort casinos have essentially to be away from metropolitan areas, or there have to be (continuing) limitations on gaming in those areas. Otherwise, the urban areas will detract customers and tourists away from the destination resorts and casinos. Also, it is invoked that only by keeping legal gambling away from large population areas, can associated problems like the social costs of problem gambling, addiction or violence be mitigated.

All these, and other issues, are increasingly addressed by the gaming and tourism industries around the world, modifying the US-American model of Las Vegas. In recent years, this development has been most visibly in the Asian-Pacific area, especially in Macao (Fenich and Hashimoto, 2004; Nadkarni and Leong, 2007, p. 48; Vogel, 2012, pp. 195-197).

Gaming in Asia, especially in China and Macao

In contrast to other societies, gambling as long since been an inherent part of everyday culture in Asia, mirroring its cultural worldview that gambling activities are not just a game of chance but also a reflection of a person's destiny. The first recorded accounts of gambling located in China date back to around 2300BC, when casinos were called "Gambling Houses", and where a forerunner of today's domino game was invented and played with rectangular bone tablets (Vogel, 201, pp. 185-186).

The leader in the gaming industry in the Asian and Pacific region is the city of Macao, which is often nicknamed the "Monte Carlo of the East" or "of the Orient", a special administrative region (SAR) of China. This former Portuguese colony is located on the western side of the Pearl River Delta, bordering the Guangdong Province to the North and facing the South China Sea in the South and East. Home to meanwhile 35 casinos (with more projected), already in 2006 Macao started to lead the world's casino destinations for revenue (Kaiman, 2014).

Organized gaming has been present in Macao since in the mid-17th century and was soon legalized by the Portuguese as a tool for economic stimulus in the 1840s. It has therefore enjoyed much longer period of social conditioning for residents, in establishing itself as a leading gaming destination within Asia.

Macao's small territory of only 26.8 square kilometers and a population of less than half a million people achieves yearly visitor numbers approaching 20 million. This constellation has raised long-term tourism planning issues, such as a segmentation of tourists into casino tourists and non-casino tourists (McCartney, 2005, pp. 43, 48; Nadkarni and Leong, 2007, p. 50).

In 2008, Macao surpassed the gaming revenues of Las Vegas and Atlantic City combined, while in 2012 the size of the Macao market had grown to \$33.5 billion, almost five times the size of the market on the Las Vegas Strip with \$6.1 billion, while in 2014 its revenue already jumped to a reported \$45 billion. Meanwhile, Las Vegas revenues are rivaled already by Macao's Asian neighbors Singapore (\$6 billion) and Australia (\$3.5 billion) (Daga and Lim, 2013; Kaiman, 2014; McCartney 2008, pp. 293, 295-296 and 2010, p. 170; Vogel, 2012, pp. 186-197).

Organized gambling in Macao falls into four categories: casinos, greyhound racing, sports bets, and lotteries. While much of Macao's profits in the past arose from some very high average per person wagering in so-called VIP accounts, emulating the Las Vegas model, its gaming industry has increasingly focused on attracting the middle-class, mass market tourist sector (Kaiman, 2014; McCartney, 2008, p. 303).

Macao's lucrative comparative advantage is its legal prohibition in close-by Hong Kong and in mainland China. This constellation attracts large numbers of regular or occasional gamblers from those regions, in the past compensating for the state of gaming facilities in Macao at a time when they were still frequently criticized of not reaching Las Vegas standards (Daga and Lim, 2013; McCartney, 2005, pp. 41-42; Wong 2016: 219).

Furthermore, many consider the larger demographic constellation, namely that one-sixth of the world's population living within a two-hour flight of Macao, and three fifths within a five-hour flight, as a large tourism market potential for Macao, especially for its new casino developments (McCartney, 2005, p. 48; Nadkarni and Leong, 2007, p. 49).

After a gaming monopoly held by Macao's *Sociedade de Turismo e Diversões de Macao* (STDM [Society of Tourism and Diversions of Macao], a syndicate of Hong Kong and Macao businessmen) for 42 years, in the wake of the 1999 Portuguese return of Macao to China, administrative regulations ended Macao's local gaming monopoly by opening their gaming industry to international investors in 2001 (Nadkarni and Leong, 2007, p. 47).

The government franchised gaming and construction licenses and concessions to American companies, to build and manage large US-style casino-hotels, allowing the investors to form local partnerships, the most well-known probably with the Las Vegas casino *The Venetian* (McCartney, 2005, pp. 40, 42 and 2008, p. 303; Timothy and Teye 2009, p. 122)

These companies have built and opened up dozens of new casinos in Macao alone on the Cotai Strip (a smaller version of the Las Vegas Strip), such as *The Venetian, Macao*. Macao's motive behind its gaming liberalization was manifold, such as creating new tourism market segments, making its gaming operations world-class, providing additional economic development and social stability, and enhancing its overall international image and reputation (Eadington, 1999, p. 139; McCartney, 2005, pp. 42, 44 and 2008, pp. 293, 301-303; Nadkarni and Leong, 2007, pp. 47-48, 50; Vogel, 2012, pp. 186-197; Timothy and Teye, 2009, p. 122; Wong and Chi Sen Siu, 2015, p. 225, 228).

Restructuring of the Gaming-Tourism-Finance Connections

Integration of tourism with gaming: CAT and MICE models

Macao's overall visitor numbers have steadily increased parallel to its casino profits, suggesting its continuous dependence on the gaming tourist. Macao's gambling tourism now makes up for 50% of its economy.

Current casino (re-)development projects are intended to rejuvenate both the tourism and gaming industries, to prevent any stagnation and decline in Macao's tourism destination development life cycle, and to counter competition from other gaming locations in the Asia Pacific region. Innovations of amenities include improved service, themed casinos, slot parlors, or attached coffee shops. *The Venetian*, for instance, has a 15,000-spectator-capacity sporting arena, a 92,000-square-meter shopping mall, four swimming pools, and an exhibition hall (Kaiman, 2014; McCartney, 2005, pp. 43-45).

A recent business model arose from the challenge of integrating the existing gaming industry and casino centers with the emerging meeting and convention industry and its related tourism sector. While the world once more looking to the United States and Las Vegas for their pioneering insights and lessons in this area, tailoring them to their specific situation, Macao once again took the lead for the Asia Pacific region (Fenich and Hashimoto, 2004; McCartney, 2005 and 2008, pp. 293, 301; Nadkarni and Leong, 2007, p. 48; Vogel, 2012, pp. 195-197).

Consequently, Macao has been rebranding its mainly gaming reputation to attract more tourists who would come to the area for either *Convention and Tourism* (CAT) or for *Meetings, Incentives, Conventions, and Exhibitions* (MICE), trying to unite the two concepts which are conveniently called "the coexistence of CAT and MICE".

Historically, gaming and business tourism seemed unable to coexist. While the former relied on attracting many gamblers for relatively cheap and simple amenities besides gambling, the former regularly required higher standards of services without minding too much about price (Fenich and Hashimoto, 2004; McCartney, 2008, p. 296; Nadkarni and Leong, 2007, p. 49).

Macao's government had started to reposition itself with an explicit focus on CAT and MICE already years before the gaming liberalization, which was at the time still seen as marginal by its visitors from Chinese or Taiwanese regions such as Beijing, Hong Kong, or Kaoshiung. Yet with the opening of *The Venetian*, Macao, especially intended to support the CAT and MICE industry, this model has been considerably strengthened (McCartney, 2005, p. 49 and 2008, pp. 305-306; Nadkarni and Leong, 2007, p. 48).

This has led the literature to label the new directions taken by the event and the entertainment industries for instance in businesslike terms such as "event portfolio within integrated resorts", or poetically as "the marriage of casino and event hosting" (McCartney, 2017, pp. 137 and 138).

Integration of tourism with gaming: Combined models

Overall, Macao's recent developments have created three different models to pursue: the first one still focused on the traditional gaming sector, the second one encompassing the CAT and MICE model, and the third one attempting to unite all of them, namely firstly the pure gaming model, secondly the CAT/MICE model, and thirdly the integrated resort model, which tries to offer a complete entertainment package experience the style of the Las Vegas experience where gaming is but one of several tourist attractions.

Corresponding to the initially mentioned, relatively recent close investigation and treatment of casinos in relation to travel and tourism in scientific literature and industry practice, both the "casino hotel" and the "casino resort" have now for instance found side-by-side entries in reference works, the former being defined as "a smaller hotel with a casino...that has not amenities as in larger casino resorts", and the latter as "a full-service resort with a casino...[and] several restaurants, retail stores, lounges, showrooms, and convention facilities" (Martínez, 2008, p. 117).

Integration of tourism with gaming: Chinese tourists

Fitting with the integrated resort model approach, the literature names these as the five main motivational factors for Chinese mainland tourists: 1) entertainment and novelty-seeking, 2) casino sightseeing, 3) leisure activities, 4) escape, and 5) socialization. The way reasons 1) and 2) are defined links them closely to the existence of and activities in or around casinos, namely as "tourists' desire to experience casinos, gambling, and nightlife entertainment and to learn more about the gaming destination", as well as "tourists' desire to enjoy casino facilities and to sightsee casinos, similar to the sightseeing of other attractions" (Wong, 2016, p. 219).

Further stressing the increasingly subordinate role of the "gambling-only" tourist focus, and the integration of gaming and casinos into a diversified activity and experience package, the literature finds: "While gambling is still the most important reason for Chinese to visit casinos, many of them perceive gambling as an entertainment option. They spend a limited amount of their travel expenditure

on gambling, as it is part of the experience in visiting casinos and gaming destinations. In this sense, a majority of Chinese tourists who partake of casinos go beyond mere hardcore gambling, to enjoy a diverse array of service offerings” (Wong, 2016, p. 220). This includes, maybe somewhat surprisingly, that “casinos also play a major role in fulfilling Chinese tourists’ shopping needs” (Wong, 2016, p. 220), which links however up with Macao’s mentioned efforts and implementations to innovate their amenities in places such as the *Venetian*.

Integration of tourism with gaming: Cons and Pros of Macao’s integrated model

Detractors of the model point out Macao’s lack of sufficient human resources and support coming from its educational system, given the need of highly trained service, professional personnel, or internationally certified programs and quality standards (see the discussion in Nadkarni and Leong, 2007, pp. 50-51).

Another issue of that model is its differentiation from well-established CAT/MICE tourist destinations such as close-by Hong Kong and Singapore (McCartney, 2005, pp. 48-49 and 2008, pp. 304-305; Nadkarni and Leong, 2007, p. 51).

Consequently, some argue that Macao should focus exclusively on improving and offering world-class gaming facilities and the corresponding manufactured tourism experience, and let Hong Kong take care of Asian-themed tourism experiences (Nadkarni and Leong, 2007, p. 51).

Others, however, point out that this would fail to consider Macao’s developmental line from gaming liberalization to tourism segmentation to a place which has the cultural and historical facilities to offer a tailored experience for every kind of tourist.

Macao’s longstanding experiences and recent experiments have been taken up by Australia, and developed further by Singapore, while the whole of the Asia Pacific region must eventually face gaming-related issues influencing tourism (McCartney, 2005, p. 49 and 2008, p. 307; Nadkarni and Leong, 2007, p. 53; Vogel, 2012, pp. 195-197). These issues are discussed below, after an analysis of the areas of Australia and New Zealand, and especially of Singapore and Southeast Asia.

Other Asian-Pacific regions and cases: Australia and New Zealand

Australia legalized its first casinos in the state of Tasmania and the Northern Territories in the 1970s and 1980s. Initially, the continuing prohibition in the rest of the country caused continuous casino tourism travel to these states. But by the mid-1980s Australia became the world’s first country to emulate and legalize American style casinos in Perth, Adelaide and Brisbane, with casinos operating in every part of the country by 1997 by way of exclusive franchise monopolies run by private companies (Eadington, 1999, p. 130).

This development of casino tourism to the metropolitan centers led to a decline of casino tourism to remote locations, which were then hoped to be stimulated by international tourism. However, the local populations continued to be their main customer base, except in major tourist destinations on the Gold Coast and the Great Barrier Reef (Eadington, 1999, p. 131).

A few casinos have successfully attracted high-stakes players from the surrounding capitals of Hong Kong, Singapore, Taiwan, Bangkok and Kuala Lumpur. While engaging especially in the game of Baccarat, they have a significant impact on the earnings of the beneficiary casinos and the country's foreign exchange (Eadington, 1999, p.131).

New Zealand has taken note of the Australian and Macao models and practices. So too have countries located between them in Southeast Asia, some of them even trying to trump Macao's link of casinos and tourism (Eadington, 1999, p. 131; Nadkarni and Leong, 2007, p. 51).

Other Asian-Pacific regions and cases: Singapore and Southeast Asia

This furthering of the link between casinos and tourism applies especially to Singapore. This city-state (having changed its slogan from "Renaissance City of Asia" to "Monaco of the East" within the last two decades) legalized gambling in 2005 (after considerable local debate, and still producing a shocked reaction among parts of the population), followed by the opening of initially two casinos in 2010 (Brooks and Wee, 2014, p. 122). The city-state at the tip of the Thailand-Malaysia peninsula has quickly become the second largest gaming market in Asia. This despite casino entry fees of S\$100 (US\$80) per day or S\$2000 for an annual pass, intended to discourage gaming by the local population (Daga and Lim, 2013).

Recent mega-complexes unite comprehensive tourist resort packages with large casinos, such as the *Marina Sands Bay* casino in downtown Singapore which reports enjoy almost 100% occupancy for their 2,500 rooms, with plans to expand their holiday accommodation and convention facilities, or *Resorts World* on Singapore's Sentosa Island, by building of mid-tier business and leisure hotel with ambitions to attract families on vacation from the nearby countries of Malaysia, Indonesia, China and India, to their casino operations as well (Daga and Lim, 2013; Fenich and Hashimoto, 2004).

Singapore's strategy is thus increasingly to integrate gambling with family-friendly resorts, which is catching the attention of other Southeast and Far Asian governments such as Japan and Vietnam. Especially important for them, in difference to Macao, is to increase their casino income yet to maintain their financial independence from the gaming sector. Hence only 10% of Singapore's total revenue stems from gaming compared to 50% for Macao, but tourist numbers in Singapore jumped by nearly 50 percent over the previous three years to an estimated 14.4 million in 2012 (Daga and Lim, 2013).

In short, Singapore bets much more on tourism than on gambling, with gambling mainly and merely used as a bait to attract tourism. Its lesson seems to be that casinos need tourism to flourish, and tourism can grow with casino establishment or improvement. But casinos alone, except for the initial periods of Las Vegas and Macao, are not enough anymore to sustain tourist attraction (Daga and Lim, 2013; Nadkarni and Leong, 2007, p. 47).

Meanwhile, Macao's model(s) might well be followed by its regional neighbors due to favorable factors such as steadily emerging low cost airlines, or suggested government incentives such as lower gaming taxes to encourage casinos to offer more gaming possibilities.

Correspondingly, motivated by the combination of increased middle-class tourism, convention business, parlor amenities and all-round tie-in entertainment offers, the governments of several other

Asian countries, especially Japan, Vietnam, Korea and the Philippines are predicted to realize several large casino-plus-hotel complexes. Malaysia already attracts visitors from neighboring Thailand and close-by South East Asian countries due to the prohibition of gambling in those areas.

With Macao's and Singapore's concepts now discussed for casino tourism destinations in several Asian countries, from the legalization of gaming up to comprehensive package offerings to leisure and business tourism for single or family travelers, Asia is by now recognized as the world's leading growth market for legalized gambling. It might soon be so for the entire gaming-related tourism package. That will also depend on how it will deal with gambling-related issues (Daga and Lim, 2013; Fenich and Hashimoto, 2004; Nadkarni and Leong, 2007, pp. 51-52).

Gambling-related problems and issues in the Asian-Pacific region

A constant worldwide discussion has been whether the casino business and the establishments of casinos in the neighborhood is a benefit or a curse for the local tourism industry. Predicted was a competition with and syphoning effect away from the local hospitality industry such as hotels, restaurants, convention centers, and tourist landmarks and attractions, together with a negative influence on the reputation of established local tourist areas (Murdaugh, 2012, pp. 60-64; Fenich and Hashimoto, 2004; Vogel, 2012, pp. 195-197).

Also feared was a backlash as a reaction of residents to potential casino failures. These initial concerns were mitigated by US-American research results and then adopted by the Asian and Pacific region (Jacob, 2017, p. 249; McCartney, 2005, p. 47).

A special feature of Macao is the combination of its cultural heritage, historical development, and geographical location, which all attract visitors that can thus strengthen both the tourism and the casino industry, especially when adding the tourist attraction of a gaming location to an already rich cultural-historical setting. Hence supporters of the CAT/MICE model see in the combination of gaming opportunities, CAT/MICE facilities, and cultural-historical attractions three potent factors uniting to strengthen gaming, tourism, and thus also casino tourism (McCartney, 2005, p. 47 and 2008, pp. 299-306; Nadkarni and Leong, 2007, p. 48).

The literature stresses the influences of casino tourism on the local population and residents as manifold, such as dramatic social changes such as the shock of the high influx of gamblers, the shift from a focus on their interests to one on servicing the gamblers, or the uneven distribution of the social costs that have to be borne by the local community (Carmichael, 2006, p. 121; Carmichael and Jones, 2007, p. 97; Stokowski and Park, 2012, pp. 658-659; Strauss, 2015, p. 62).

In this sense, Macao's mostly non-gambling resident population contrasts with its mainly gambling-focused tourists, which raises questions of local resident support for, and attitude towards any further casino-plus-tourism development plans. Rising buildings, noise and water pollution, traffic jams and environmental destruction might clash with Macao's cultural world heritage status and perceived original tourism value (McCartney, 2005, p. 47).

Supporters of this concern invoke that casinos can operate, and casino tourism thus function also disconnected from cultural surroundings, since casino tourists, once starting to game and consuming their 'manufactured' tourist experience, are basically not taking in any of the 'authentic' tourism

surroundings. This might discourage from efforts to protect Macao's cultural heritage. As a logical consequence, increased success in attracting casino and gaming tourism might diminish the authenticity of the cultural-historical tourist experience that is was meant to enhance the gambling experience in the first place (McCartney, 2005, p. 45 and 2008, p. 305).

This paradox, and the sought-after total tourist experience by means of integrating different types of tourism and of travelers, will continue to challenge policy makers in the Asian and Pacific region in their planning of further gaming facilities. These developments could also make casino tourists to be ever more conscious about casino locations, gaming opportunities, package deals and associated amenities. But they might also require their choices to be ever more responsible, not just about their gaming decisions and influences on their social circles, but also regarding their sociocultural and ecological settings – long before any chips are rolling or planes flying.

Conclusion: The Future of Gambling, Finance and Tourism in Asia

Gambling and tourism present fundamental parallels and paradoxes: both represent age-old, basic human activities and interests, which in considerable parts and periods of human history were considered incompatible. By contrast, more recently and in certain industry circles they are understood almost inseparable.

Their differences seem to go similarly deep: tourism has, throughout human history, been considered a beneficial (even if not always purely benevolent) human activity and endeavor and activity, in marked contrast to gambling, which probably even many professional or passionate gamblers would characterize as the extreme end of healthy commercialism and risk at best, and of human corruption and ruin at worst.

Maybe it is this complex network of historical and contemporary parallels and paradoxes which fascinates both business and bystanders about the process and players of the modern connection between gambling, tourism, and finance.

In any case, their relationship has become even more complex by the addition of further factors which hitherto were of no concern. Here are named just a few immediately recollected ones from recent news and socio-political discussions:

1) Destination considerations:

- a) residential and social welfare feelings;
- b) cultural heritage or environmental protection;

2) Global industry and image management:

- a) reputation of the business sectors of gambling and finance especially after the global financial crises of the beginning of the 21st century;
- b) the role model function of the world's economically strongest industries trickling down to all levels of society, especially those legally unable or ethically unwilling to support any gambling and related financial activities, such as minor of age, financially poor people, or those ethically objecting to related activities;

3) Fundamental questions of compatibility and capacity:

- a) geographic or demographic ones, for instance the limited landmasses of Hong Kong or Singapore;
- b) traditional and cultural ones, for instances in the large religious communities worldwide such as Islam where gambling is still not a socially sanctioned activity.

How the representatives of this relationship triangle of tourism, gambling and finance will define their commonalities, differences and dynamics in the present and the future might imply not just the members of their own sectors, but many more of us. After all, economical investment and risk, as well as physical and psychological movement and progress, are part of our human fabric. It is in all our interest to have its conflicts resolved as constructively as possible.

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